

Administrators And Views

The term "Views" in PlayMaker describes the data that is being shown when a user clicks on the Accounts, Contacts or Referrals tab. By default, users have a couple of pre-existing views. All users have the ability to create and edit their own views, giving them the flexibility of viewing the information that is most important to them.

Global Views & Role Permissions

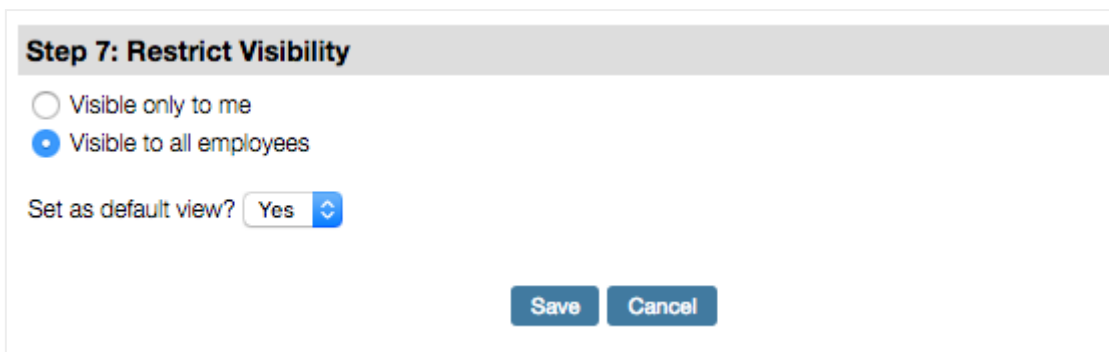
Users that are assigned the Administrator role can also create views for themselves, but they also have the ability to create "global views," or views seen by all users. These views can also be set as the "default view," or the first view a user sees when loading the Accounts, Contacts or Referrals page. However it is important to account for role permissions when creating a Global View. Role Permissions can determine what data different users have access to. In many cases:

- Account Executive users may not have access to unassigned referrals, while managers or administrators may
- Account Executives are often limited to seeing only their referrals, not all referrals for their branch or business.

This means that a global referral view set up to show "My Team," or a set list of users, will still only display the referrals assigned to (or owned by) that Account Executive.

Creating Views as Admins

Creating a global view follows the same steps as creating views for an individual. However, in Step 7 (pictured below), Administrators have the option to set whether a view shows only for themselves or for everyone. This step also provides the option to make this view the default view.



The screenshot shows a dialog box titled "Step 7: Restrict Visibility". It contains two radio button options: "Visible only to me" (unselected) and "Visible to all employees" (selected). Below these options is a label "Set as default view?" followed by a dropdown menu currently showing "Yes". At the bottom of the dialog are two buttons: "Save" and "Cancel".

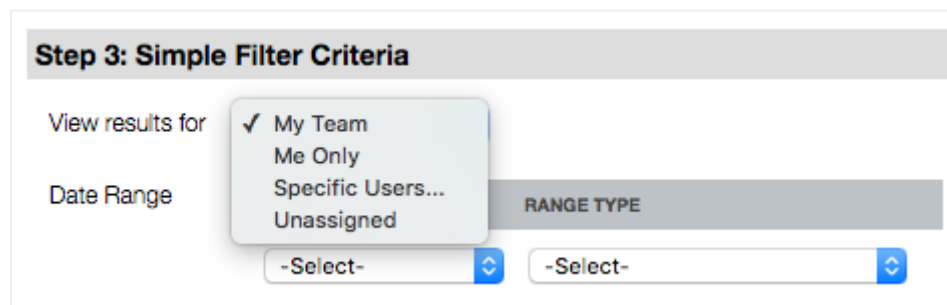
Using Global Views to Manage the Team

By utilizing the "Me Only" option in Step 3 of creating a view, an Admin can create a single view that is personalized for each user. The resulting view would show each Marketer only the information applicable to them. As a global view, this ensures each marketer in the organization has access to the same information. Two suggested examples include:

- My Referral MTD
- My Admits MTD

These examples would show an Account Executive the appropriate referrals or admits for the current month-to-date.

By utilizing the "My Team" option in Step 3 of creating a view, an Admin can create a single view that includes each user's team information. Note, that due to permissions, the resulting view would show each Marketer only the information applicable to them. For Account Executives, it would likely display only their own referrals. For an Office Manager, it would show the admits for all users of their branch, while a Region Manager would see all admits for the branches within their region.



The screenshot shows a configuration interface titled "Step 3: Simple Filter Criteria". It features a "View results for" dropdown menu with a checkmark next to "My Team" and other options: "Me Only", "Specific Users...", and "Unassigned". Below this, there are two "-Select-" dropdown menus under the "RANGE TYPE" header.

Another consideration for global views would be to make sure that the table of data shows relevant information to the intended audience. As an Administrator on a PlayMaker account that uses integration from their EMR to populate referrals, a user may want to view SyncIDs or a particular field to ensure data is populating correctly. However, including the SyncID on a view designed for Account Executives may complicate the table of data by adding an additional element that may not have meaning to the users that utilize the view. The columns of data are defined in *Step 2* when editing or creating a view (pictured below).

Step 2: Choose Which Fields to Display

Available Fields		Fields to Display	
Notes	»	Referral Status	Top
Verified	«	Date Entered	Up
Non-Admit Reason Details		SOC Date	Down
Last Modified On		Non-Admit Date	Bottom
Last Modified By		Primary Physician	
Business Line		Referring Facility	
Branch		Referring Person	
Discharge Date		Patient Name	

Other Common Views for Managers

Another common practice would be to create views that show referrals/accounts/contacts for an individual. This makes finding data that is owned by specific users very easy, should the view already be saved. While this may not make a great global view, it can certainly be handy for Administrators or Managers to set up to quickly view data owned by a specific team member. This would be done by using the *Specific Users...* option in the *View results for* drop-down, which allows users to be selected individually and added to the filters of the view.

Support from PlayMaker

PlayMaker understands that Views and Global Views can be complicated. Please contact support with any issues or questions.

Note: Most views are saved to the user's account, and aren't visible to all users. When seeking assistance with views from PlayMaker Support, users should [grant login access](#) so that the view in question can be seen by our support staff. Global views can be viewed by PlayMaker Support without granting login access.